




COVID-19 Community Team Outreach Tool

Referrals in CCTO



CCTO supports the functionality to document referrals for vaccines, resources, and other types of support. **Referrals** are a type of record that is connected to contact or case profiles in the same way that assessments and activities are. When you log a referral, keep the following in mind:

-  • A referral is **not a replacement for a phone call** being logged in **Timeline/Activities**. If a referral is made, it should be logged in addition to the phone call that took place.
-  • **Voicemails** that include info on referral-related resources or specific vaccine opportunities **may also be documented as an offer of referral**.
-  • It is recommended that a **vaccine referral is documented for each individual** who is reached by phone as a contact or a case, even if they decline the referral.

Requirements for All Referrals

Before you begin, be sure you have logged a phone call in **Timeline/Activities**. **For detailed information about referral fields, see final page of this document.**

1. You can see all referrals in the system through the Referrals Tab, which includes a view for **My Referrals** and a column for the referral subject's county in all views.
2. Within a profile, you can view all referrals associated with an individual by clicking on the **Referrals Page**. Click **+New Referral** to create a new referral record for this individual.
3. **Source Contact** and **Referral Date** will automatically populate. **R#** is a unique identifier that populates upon saving.
4. **Referral Type** can be selected to "Vaccine," "Resource," or "Other." Selecting each option will produce unique options per the descriptions in the next section.
5. You can then indicate the **Type of Communication** and **Type of Campaign** in the designated fields.
6. **Outcome of Referral** will display different options depending on your selection in **Referral Type**. Use this field to indicate the final status of this referral.
7. **Communication Preferences** will also display different options depending on your selection in **Referral Type**.

1 Apps

2 Test Contact
Contact · MDA Form ▾
ARIAS Contact Assessments All Activities **Referrals** ▾
+ New Referral

3 Basic Info
R# R-0000001010
Source Contact * Rowena Ravenclaw

4 Details
Referral Type * --Select--
Referral Date * --Select--
Vaccine
Resource
Other

5 Details
Type of Communication Outreach Call
Type of Campaign Specific Event
Event Name Free form text
Event County Dare
Event Date 4/13/2021

6 Outcome of Referral (if known) Vaccine Scheduled

7 Communication Preferences Do not contact in future about vaccines

Notes from Referral ---

QUICK TIP:

Selecting **"Specific Event"** in **Type of Campaign** will produce extra fields (shown here) to allow you to provide more information about the event.

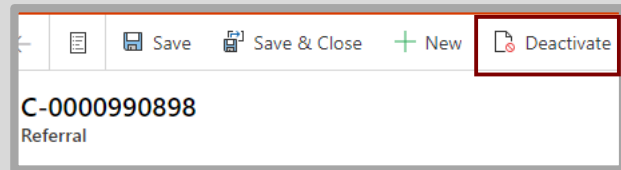
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Deactivating a Referral (Optional)


After saving and completing all fields, you have the option to deactivate this referral. This option is similar to the deactivation option for assessments and is not required. *If you are directed to deactivate completed referrals, please note that these will appear in the **Inactive Referrals** view.*



Additional Requirements for Each Referral Type

As stated on the prior page, there are three types of referrals that can be logged: **Vaccine**, **Resource**, or **Other**. Selecting each type will produce unique options per the next three sections. Recommended documentation is as follows:

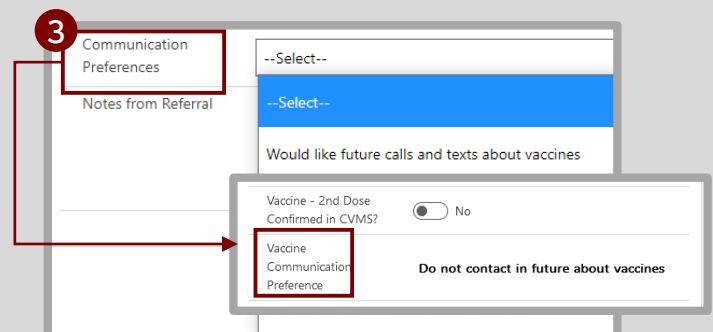
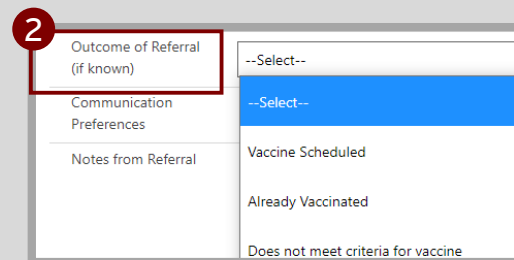
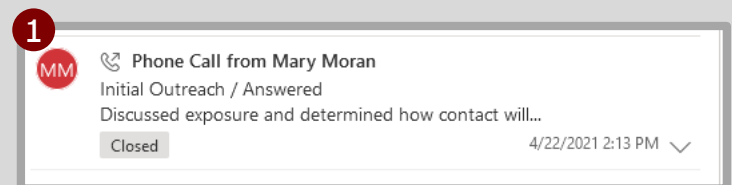
 • **VACCINE:** All contacts and case patients who are reached by phone should have a vaccine referral recorded (if they have not already been referred to vaccination), even if the referral is declined.

 • **RESOURCE:** All contacts and case patients who are reached by phone should be asked if they have a resource need, and **if they respond yes**, a resource referral should be recorded.

Vaccine Referral (RECOMMENDED FOR ALL INDIVIDUALS)

This referral type should be selected for a referral to vaccination support, which **should be offered and documented for all contacts or case patients** who are reached by phone as part of routine CT/CI operations, even if they decline.

1. Log a phone call and complete the standard fields as described per the process on the first page and the descriptions on the final page.
2. When appropriate, complete the **Outcome of Referral** field to document the final result of this outreach and referral.
3. Indicate the individual's **Communication Preferences**. Note that your selection in this field will auto-update the profile field for Vaccine Communication Preference. *This field can also be updated on contact profiles at any time.*



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Resource Referral

This referral type should always be used and recorded if a non-vaccine resource need (such as food, housing, or legal help) is identified.

1. Log a phone call and complete the standard fields as described per the process on the first page and the descriptions on the final page.
2. **Referral Need** will appear if the "Resource" referral type is selected. Use this field to select one or more descriptors for any resource(s) needed. Select as many resources as are indicated by the individual.
3. When appropriate, select the **Outcome of Referral**.
4. In the **Referred To** box, select the **Agency**. This field lists the organization to which you have referred this individual. If "Other" is selected, a free text field is produced.
5. Provide the **Agent Name**. This is a free text field for the name of the individual to whom you have referred this contact or case patient.
6. Finally, fill in the **How Referred** field. This field lists the process used for your referral. Selecting "Other" will produce a free text field.

1. Phone Call from Mary Moran
Initial Outreach / Answered
Discussed exposure and determined how contact will...
Closed 4/22/2021 2:13 PM

2. Referral Need: Food Assistance X Income Support X Housing & Shelter X

3. Outcome of Referral (if known): --Select--
Communication Preferences: --Select--
Notes from Referral: Confirmed Needs Met
Connected with CHW (if applicable)
Pending Action
Other

4. Referred To: Agency CHW

5. Agent Name [name]

6. How Referred: Provided contact information (no transfer)

How Referred: Other
How Referred - Other ---

Other Referral

The **Other** referral type should only be selected if a referral cannot be described under the "Vaccine" or "Resource" categories. If you have selected "Other Referral," a free text field for **Referral Type Description** will appear to allow you to provide more information. Additionally, the **Outcome of Referral** field will become a free text box.

Details

Referral Type: * Other

Referral Type Description: [description]

Referral Date: * 4/20/2021

Quick Reference: Referrals

What type of phone call is being made or received?

TYPE OF COMMUNICATION	Outreach Call if this is an outbound call being made for the purpose of a referral. <ul style="list-style-type: none"> Outreach Call – Answered should be used if a referral call is answered. Outreach Call – Left Voicemail should be used if a referral call is made but not answered, and a voicemail has been left. 	EXAMPLE	Calling a contact to let them know about a vaccine event.
	Monitoring Call if this is a referral made as part of a standard initial or daily monitoring call (inbound or outbound).	EXAMPLE	Contact notes a resource need during initial assessment conversation, and you refer them to support.
	Incoming Request if this is an inbound call from a contact or case being made for the purpose of receiving a referral.	EXAMPLE	Contact calls seeking information about food assistance.

What was the context of the referral?

TYPE OF CAMPAIGN	Awareness if you are providing general support information that is not connected to a specific event or request. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Providing education to a contact about vaccine availability in their area.
	Specific Event if you are providing this individual with information about an upcoming event. <i>(Typically an Outreach Call.)</i>	EXAMPLE	Calling a contact to let them know about an upcoming vaccination event in their area.
	Specific Request if this individual requests information about a specific need. <i>(Typically a Monitoring Call or an Incoming Request.)</i>	EXAMPLE	On a monitoring call, a contact lets you know they need assistance with housing.

What type of referral is being made?

VACCINE		RESOURCE		OTHER	
KIND OF REFERRAL?	REFERRAL TYPE	REFERRAL TYPE	Resource if the referral is for another resource need, such as food assistance, legal help, or transportation. <i>This referral should be logged if the contact responds “Yes” to resource need inquiries.</i>	REFERRAL TYPE	Other if the referral cannot be captured by “Vaccine” or any of the categories listed in “Resource.”
		REFERRAL NEED	Use this multi-select field to select one or more descriptors for this resource need. <i>(Selecting “Other” will produce Referral Need – Other, a free text field to gather more information.)</i>	REFERRAL TYPE DESCRIPTION	Use the free-text field to add more information about this referral.
OUTCOME OF THE REFERRAL?	OUTCOME OF REFERRAL	OUTCOME OF REFERRAL	<ul style="list-style-type: none"> Confirmed needs met Connected with CHW (if applicable) Pending Action <i>(if the outcome of this referral is yet to be confirmed)</i> Resource Not Available <i>(if the resource needs are unable to be met)</i> Other <i>(will produce a free text field)</i> 	OUTCOME OF REFERRAL - OTHER	Free text field for you to provide information.
		AGENCY	The organization to which you have referred this individual: <ul style="list-style-type: none"> 211 CHW Local resource Other <i>(will produce a free text field)</i> 		
		AGENT NAME	Free text field for the name of the person to whom you referred this individual.		
		HOW REFERRED	The process used for this referral: <ul style="list-style-type: none"> Transferred to person (warm transfer) Transferred to phone number (cold transfer) Provided contact information (no transfer) Other <i>(will produce a free text field)</i> 	NOTES FROM REFERRAL	Required free text field for you to provide information.

DON'T FORGET: A referral does not take the place of a phone call logged in Timeline/Activities. You must log BOTH a phone call record and a referral record!